



Genesee Valley Chapter

# CHAPTER VERSE ONLINE

## National Philanthropy Day 2006

Philanthropy – from the Latin meaning “the love of humankind.” For so many in the Greater Rochester Community the meaning is “giving,” of money, of time, of ourselves, to help others.

National Philanthropy Day 2006 – the day we celebrate Philanthropy. Please join the Association of Fundraising Professionals, Genesee Valley Chapter, as we recognize the work done by individuals, corporations, volunteers, and fundraising professionals that has a profound impact on the critically needed services our community provides.

This year’s celebration will be held on **Friday November 17, 2006, from 11:30 a.m. – 1:30 p.m., at the Rochester Riverside Convention Center.** One Award will be presented at the luncheon celebration from each category.

This year’s Philanthropy Award categories and nominees are:

### Outstanding Philanthropist

Bruce Bates and the late Nancy Bates  
Louise Epstein  
Robert C. Horton  
Mark Rosica  
The Wilmot Family

### Outstanding Corporation

Bausch & Lomb  
Citizens Bank  
Eastman Kodak Company  
M & T Bank  
Paetec Communications  
Zeller Corporation

### Outstanding Volunteer Fundraiser

William A. Buckingham  
Stewart D. Davis, Esq.  
Frances Moroney Whited and  
the late Clark Whited

### Robert J. Clinger Outstanding Fundraising Professional

Kathleen E. Pavelka, CFRE  
Jill A. Pranger, ACFRE  
Tracy L. Schleyer, CFRE  
Steven S. Smith, CFRE

You will not want to miss this exciting event with more than 500 of your colleagues and friends expected to attend. There will be opportunity to thank our sponsors, and if your non-profit has received a gift from any of this year’s nominees, you will certainly want to acknowledge them with your presence.

Individual tickets and table sales may be obtained online at [www.afpgv.org](http://www.afpgv.org) or by calling the AFP Genesee Valley Chapter Office at 585-586-7810. ■

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## From the President

The lazy days of summer are gone, although I don't think there is such a thing anymore for any of us in development, and the crazy days of fall are here! Golf tournaments are done and gala, annual campaigns and year-end giving are here.

Over the summer, our AFP leadership participated in our annual retreat, held at the Genesee Waterway Center. We took a critical look at our financial position, evaluated our professional conference held in May, reviewed our monthly programs from both the first part of the year and those on the schedule through December, and discussed our outlook for 2007.

There's lots of AFP activity going on between now and the end of the year, much of which you will read about in this issue of *Chapter & Verse*. You should have already received your invitation to National Philanthropy Day to be held on November 17th at the Rochester Riverside Convention Center. We have an impressive list of honorees in each of our award categories and it will be exciting to recognize them all and announce our 2006 recipients at the luncheon. Make your reservations today!

Don't miss the opportunity to join us for our Holiday Get-Together at the Little Theatre Café in December. We will officially accept the new slate of board members and officers for our 2007 year as well as recognize those board members who have completed their years of service to AFP.

Committees for 2007 are starting to form this fall as well. If you are interested in serving on any one or more of those, please let us know. And if you have any questions, as always, I will be happy to chat with you!

*Carol Anne DeMoulin*

Carol Anne DeMoulin  
President  
AFP, Genesee Valley Chapter  
[cdemouli@arthritiis.org](mailto:cdemouli@arthritiis.org)

## Welcome to our Newest Members!

**Carole Dowling**  
7 Thornwood Circle  
Pittsford, NY 14534

**Alec Drummond**  
Field Advisor  
Met Life  
20 Hillbrook Circle  
Pittsford, NY 14534

**Bobbie Gardener**  
Campaign Development  
Southeast YMCA  
111 E. Jefferson Road  
Pittsford, NY 14534

**Chuck Levengood**  
Director of Development  
Seneca Park Zoo Society  
2222 St. Paul Street  
Rochester, NY 14621

**Alison Martinez**  
Manager — Annual Giving  
and Marketing  
Assoc. for the Blind and  
Visually Impaired — Goodwill  
of Greater Rochester  
422 S. Clinton Avenue  
Rochester, NY 14620

**Sara Maxwell**  
Director of Corporate Events  
American Heart Association  
2113 Chili Ave  
Rochester, NY 14624

**Dr. Andrew Rawdon**  
Director of Development  
Compeer, Inc.  
259 Monroe Avenue  
Rochester, NY 14450

**Allynn Smith**  
Executive Director  
Bishop Sheen Ecumenical  
Housing  
935 East Ave., Suite 300  
Rochester, NY 14607

**Abigail Wade**  
Director of Development and  
Communications  
NeighborWorks Rochester  
570 South Avenue  
Rochester, NY 14620

**Dr. Carol Wittmeyer**  
President  
Meliora Group  
2491 Pine View Drive  
Allegany, NY 14706

**Elizabeth Zogby**  
Director of Development  
Mt. Hope Family Center  
187 Edinburgh Street  
Rochester, NY 14608





## A closer look at some of our new members

### Abby Wade

Abby Wade is the Director of Development and Communications for NeighborWorks® Rochester, a 27-year-old nonprofit that provides homeownership education, rehab loans, lead testing and neighborhood revitalization services for homeowners in the city of Rochester. She joined AFP to build her professional network and have access to the most current information available in the field of fundraising. Abby has hit the ground running, already volunteering for the Membership Committee to help re-institute new member orientations. During her career, she has received awards from both the Public Relations Society of America (PRSA) and the International Association of Business Communicators (IABC).

Abby resides in the Merchant-Culver Neighborhood and when she's not working, enjoys running, traveling, crocheting, working in the yard and doing home improvement projects. Her favorite quote is "Be the change you wish to see in the world."

### Elizabeth Zogby

Beth is the Director of Development for the Mt. Hope Family Center. She's been in institutional advancement for some time - with university alumni as her main constituent/prospect base — so CASE had been her primary professional resource. Now that she's with a community-focused center within the University of Rochester, Beth wanted to



network with peers from more traditional non-profit/human service organizations in the Rochester area.

Beth resides in the city with her beagle, Louise. In her free time, she enjoys running, yoga, other fitness, reading, speaking French, volunteering, travel, the arts, good food and wine, and the company of family and friends. Her favorite quote is "We always did feel the same, we just saw it from a different point of view." (Bob Dylan from the song *Tangled Up in Blue*.)

### Alison Martinez

Alison is a 2001 graduate of the University of Rochester and was recognized as a Graduate of High Distinction. She has also received the Irene Grace Bunde Award in public speaking. As the new Annual Giving and Marketing Manager at the Association for the Blind and Visually Impaired (ABVI) – Goodwill, Alison is responsible for the management of all aspects of the agency's annual giving program, including the development of strategies and tactics to increase donors, managing the fundraising appeal development, and serving as the lead staff person to plan and oversee the agency's Annual Celebration. She first became involved with AFP as Manager of Special Campaigns and Planned Giving at George Eastman House in 2001. Since then, she has worked in undergraduate admissions at University of Rochester and taught English as a Foreign Language in the Galapagos Islands.



Alison resides in Pittsford with her two cats – close and trusted friends! When not working, Alison enjoys running, cycling, coaching softball and volunteering with refugees. ■

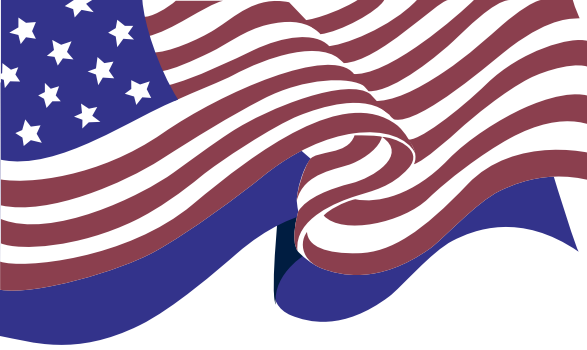
## MARK YOUR CALENDARS!

This year's conference will be held on May 3, 2007 at the Rochester Riverside Convention Center.

I'm honored to serve as the chair of this year's conference, and delighted to head a talented conference committee. We welcome your suggestions for topics and presenters, including headline presenters. And, now is the perfect time to speak with AFP about sponsoring the conference, or being an exhibitor.

Please don't hesitate to contact me with your ideas and suggestions. Best wishes!

Tim Thomas, Advanced Marketing, (585) 265-1565, [ttamktg@cs.com](mailto:ttamktg@cs.com)



# Government Relations Updates

*Submitted by Liz Wilder,  
Government Relations*

## NEW YORK STATE

**New York State Health Foundation.** After a four-year delay, state courts have given the green light to the New York State Health Foundation to begin grants to improve health care for uninsured New Yorkers. The state legislature and Gov. Pataki created the foundation in 2002 with 5% of the proceeds of the conversion of Empire Blue Cross Blue Shield – 95% was used to pay healthcare worker salaries in the NYS budget. The Foundation has assets of \$250 million. Visit their website at [www.nyshealthfoundation.org](http://www.nyshealthfoundation.org).

## U.S. CONGRESS

### **H.R. 4 Pension Act of 2006 – Charitable Incentives**

**IRA Charitable Rollover.** The IRA rollover provision included in the pension reform bill provides an exclusion from gross income for certain distributions of up to \$100,000 from a traditional individual retirement account (IRA) or a Roth IRA, which would otherwise be included in income. The provision is effective for two years through 2007, and only applies to donors age 70 1/2 and older.

**Excess benefit transactions** with disqualified persons. Penalties increase for organization managers to \$20,000 maximum.

**Donor Advised Funds** – for funds maintained by public charities and for profit organizations.

1. Treasury Department Study to examine gifts terms and payout requirements.
2. Definition of Donor-Advised Fund: confirmed separate account, owned by organization, advised by donors. Does not include funds with committees not controlled by donor of funds with designated recipients.
3. Prohibits grants to individuals, private non-operating foundations, supporting organizations, requires expenditure responsibility for grants to non 501(c)(3)s.
4. Permitted grants to sponsoring organization and other donor-advised funds. International grants must use equivalence determinations or expenditure responsibility.
5. Penalties for receipt of more than incidental benefits. In addition to recommender and recipient, the fund manager(s) approving the grant are subject to penalties.
6. Excessive fees for investment advisors, even those not disqualified – subject to penalties.
7. Charitable deductions. Gift acknowledgement to donors must explicitly affirm that the sponsoring organization has exclusive legal control over the contributed assets.
8. Reporting Requirements. Form 990 must include: total number of donor-advised funds; aggregate assets held by funds; aggregate contributions to and distributions by funds. ■

## STAY TUNED...

As a development professional, you understand that fundraising is all about relationships. The Genesee Valley Chapter of AFP recognizes the importance of building relationships, and would like to announce a new Buddy Program to begin in 2007. The Buddy Program will pair experienced AFP members with first-year members with the goal of helping them connect to the fundraising community and to serve as a trusted resource for questions about their new role. If you are interested in serving as “Buddy”, please contact Alison Martinez, Annual Giving & Marketing Manager at ABVI-Goodwill (585) 697-5711.

Stay tuned to hear more about this program in the future! ■



*Chapter & Verse Online*  
is published by the  
AFP-Genesee Valley Chapter.

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